Accessible Customer Service Procedure

Subject: Ensuring Document are Accessible

This Procedure supports:

    Policy: Accessibility Policy #3012

    Objective: Employee Training

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By using the formatting tools provided in Word, assistive technologies are better able to accurately interpret the document. Create all your documents using this guideline and save a master copy prior to saving it as a different type of product; this will ensure the information is readily available for providing in an alternate format.

Accessibility support for PDF files is better than for Word documents. To save a Word document to a PDF, use the File/Save As function and select PDF under type. This type of document is accessible to document readers; documents scanned and saved on a printer cannot be read by these assistive technologies.

- ☐ Use plain language.
- ☐ Provide a table of contents for long documents.
- ☐ Do not use text boxes; use a bordered paragraph for visual effect.
- ☐ Do not use Tables for layout purposes.
- ☐ Use Column Formatting for columns, not spaces and tabs.
- ☐ Use List formatting; numbered where order is important, bullets when it's not.
- ☐ Text should be Left-Aligned

Styles

- ☐ Edit Styles in order to format document;
- ☐ Style elements have a different look from the others (i.e. Heading1 looks bigger than Heading2 etc.);
- ☐ Headings levels are correctly ordered;
- ☐ Do NOT use font formatting to style text. Use the Styles Menu on the tool bar as shown below.
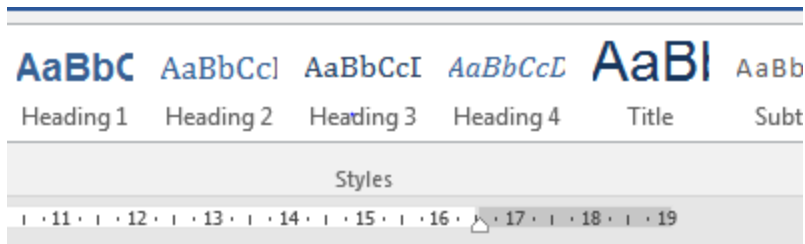
Figure 1- Picture of Styles Menu

Fonts

☐ Use 12 point or larger;

☐ Be consistent with the fonts used in the document;

☐ Use a sans serif font – such as Arial, Helvetica or Verdana;

☐ Using italics or upper-case letters for emphasis is not recommended.

Colors

☐ Use appropriate colour contrast (i.e. black and white);

☐ Make sure that all information conveyed with colour can also be conveyed without colour;

☐ For print documents use a matte/non-glossy finish.

Spacing

☐ To start a new page, use the Insert tab then Page Break; don't press Enter repeatedly to start a new page;

☐ Adjust spacing through the Paragraph formatting menu;

☐ Space between the lines should be at least 25 to 30% of the point size. To change, go to the "Paragraph Formatting" menu, Line and Paragraph Spacing and change to "Multiple 1.3"
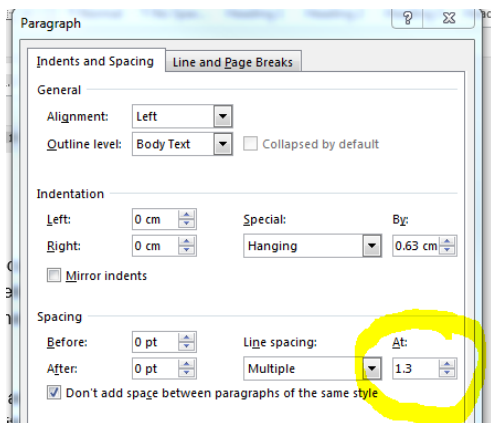
Images

☐ Set wrapping style of non-text elements as "In line with text";

☐ Add alternative text to graphics and images; the Accessibility Checker provides step by step instructions for this function.

☐ Avoid text boxes and Word Art as they may be inaccessible to screen readers;

☐ Avoid using watermarks and background images as they can make documents illegible.

Columns

☐ To properly insert a column use Page Layout tab then Columns;

☐ Avoid using spaces and tabs, it will not be recognized as a column by assistive technology.

Tables

☐ Use the Insert tab then Table to properly insert;

☐ Use proper Table Headings and check the Header Row check box;

☐ If a table is longer than a page; Heading Rows must be repeated at the top of the table on each of the following pages.

Hyperlinks

☐ Ensure that the Hyperlink has context and describes where it leads;

☐ Avoid using "Click here" or "More info" as a link title.

Graphs and Charts

☐ Add a short caption preceding the chart or graph that describes their content;

☐ Provide an alternative presentation of any findings. For many charts, the best alternative format in which to present data is a table with the original figures.

Headers & Footers

☐ Do not manually type the page numbers. Use the Insert tab then Page Number.

Accessibility Checker

☐ Similar to "Spell Checker" Word has an "Accessibility Checker" you can add to your 'Quick Access Toolbar'. Word for Windows provides an Accessibility Checker for identifying and repairing accessibility issues.

☐ The checker's Inspection Results classifies accessibility issues into three categories:

- Errors: content that makes a document very difficult or impossible for people with disabilities to access. Example: an image with no alt text.
- Warnings: content that in most—but not all—cases makes the document difficult for people with disabilities to access. Example: a link with text that is not descriptive of its function.
- Tips: content that people with disabilities can access, but that might be better organized or presented. Example: skipping from a first-level heading to a third-level heading.

☐ Clicking an item in the results highlights the corresponding item in the document and displays the Additional Information section.

For the Website

Also see the guides for saving an Excel workbook, Word document, Publisher file, or PowerPoint presentation as an Accessible PDF.